



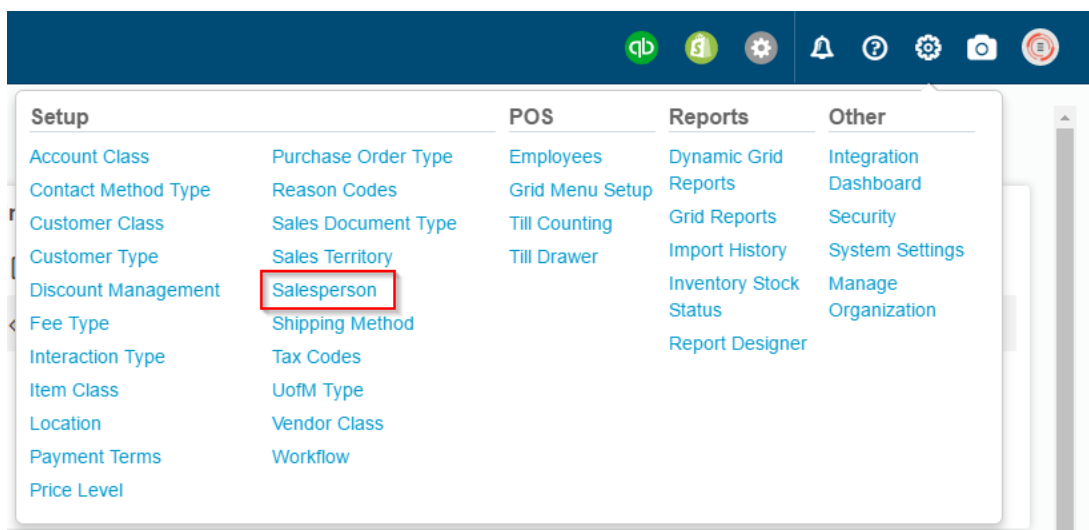
Salesperson

Megan De Freitas - 2024-12-02 - Settings

Overview

The Salesperson feature of SalesPad Cloud allows you to manage the sales associates in your company.

To get started, select **Salesperson** from the Settings menu.



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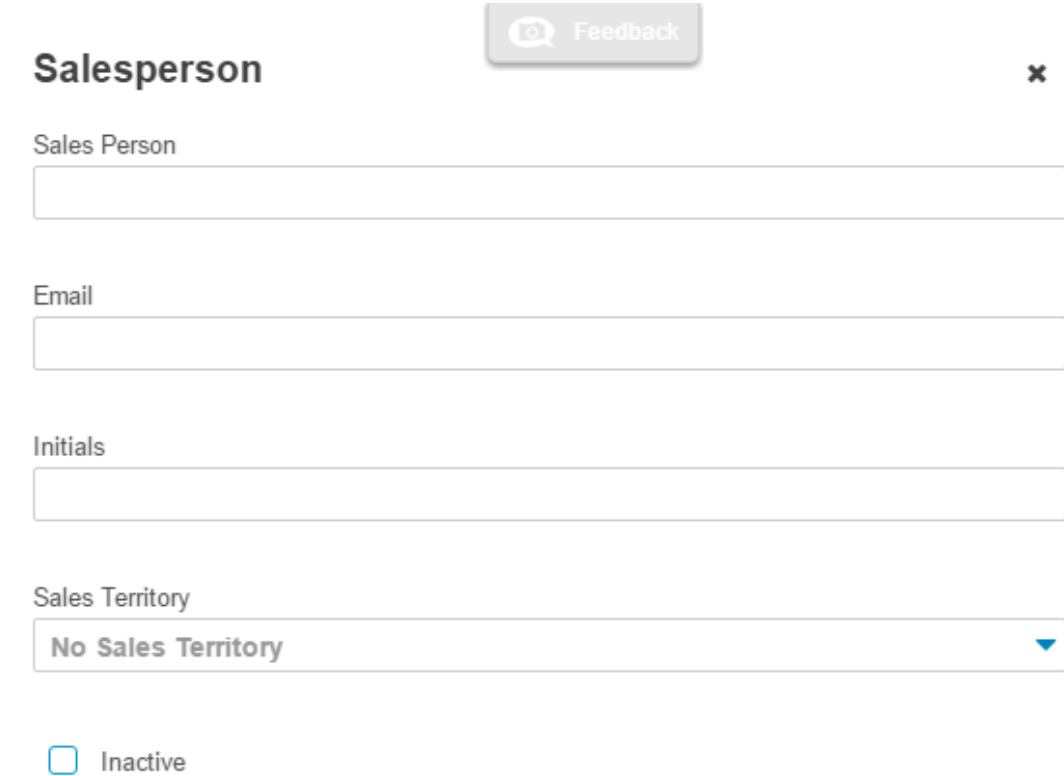
Salesperson

Create a SalesPerson

To create a Salesperson, click the **New Salesperson** button in the upper left-hand corner of the screen.



The Salesperson drawer will appear. Fill out the information fields in this drawer.



For a brief explanation of the different information fields in the Salesperson drawer, click here:

Salesperson

Sales Person - Allows you to give a name to your Salesperson

Email - Displays the email address of your Salesperson

Initials - Allows you to assign initials for the Salesperson

Sales Territory - Assigns a [Sales Territory](#) to your Salesperson

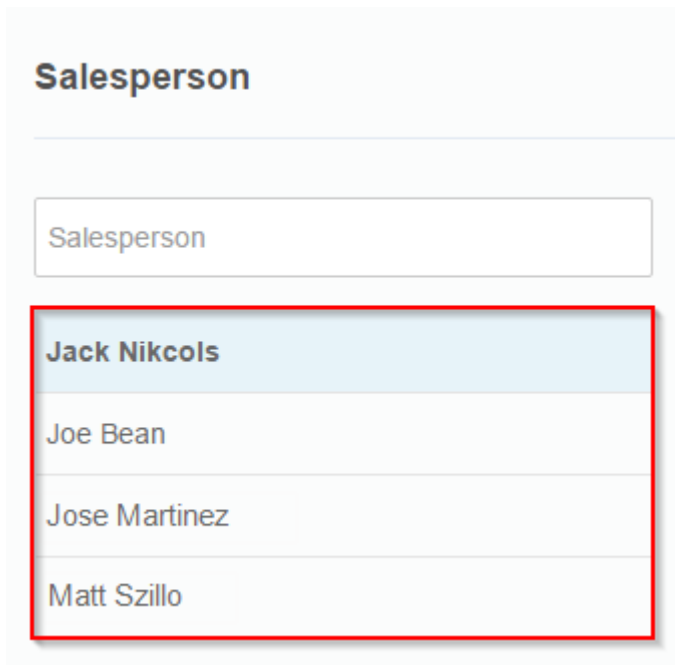
Inactive - If checked, this Salesperson is inactive

When you've finished entering your information, click **Save**.

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Edit a SalesPerson

To edit an existing Salesperson, first select the Salesperson from the list on the left-hand side of the Salesperson window.



Salesperson

Salesperson

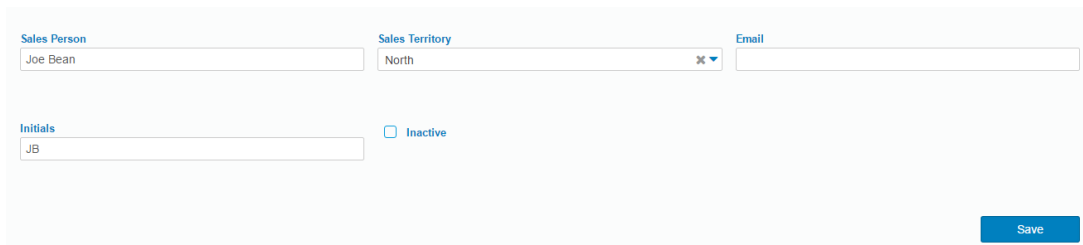
Jack Nikcols

Joe Bean

Jose Martinez

Matt Szillo

Once you've selected the Salesperson you want to edit, make your changes in the information fields on the right-hand side of the screen.



Sales Person: Joe Bean

Sales Territory: North

Email:

Initials: JB

Inactive

Save

When you've finished making your changes, click **Save**.

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See it in Action

Salespersons dropdowns appear in various places in SalesPad Cloud, including in New or Edit [Customer](#) drawers.

Create Customer

 Feedback



Customer Name

Customer Type

No Customer Type



Customer Class

No Customer Class



Price Level

No Price Level



Salesperson

No Salesperson



Sales Territory

No Sales Territory



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